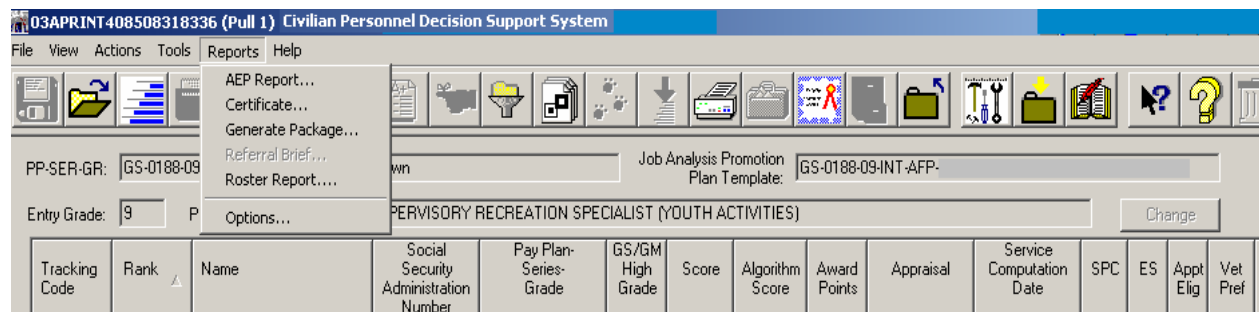# Chapter 7 - Generating a Referral Certificate and Referral Certificate Package

The Air Force Candidate Referral Certificate is designed to create certificates based on assigned Tracking Codes. To create a Referral Package or generate a Referral Certificate the first step is to go to the **Reports > Options** area of main menu.
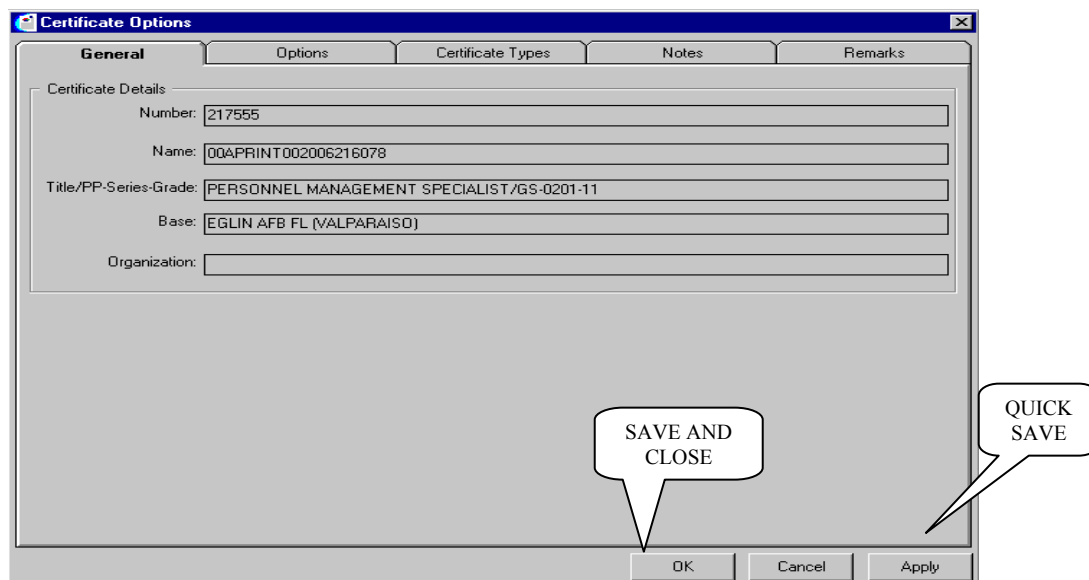

Note: When accessing the **Reports** menu, an attempt to generate a Certificate or a Package without completing the required Certificate Options Dialogue window will cause the following dialog box to appear.
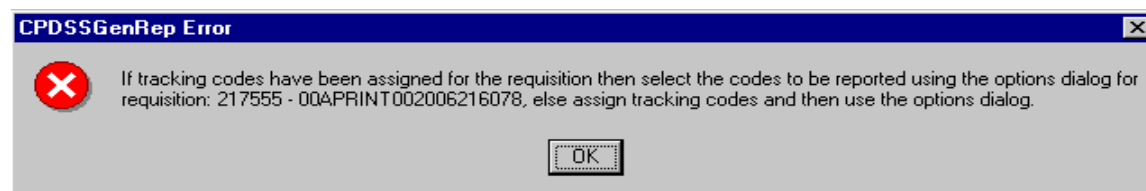
After selecting **Options** from the **Reports** area, the **Certificate Options** Window will appear. There are five tabs on this screen that are used to prepare the certificate package.

General
This tab is 'read only' and shows information that has been imported from the Resumix Requisition.

Options

This tab is used to add or modify information for the certificate.

Make sure to change the Expiration Date

A calendar can be accessed using the drop-down menu.

Certificate Types

This tab is used to select which candidates will appear on the certificate based on Tracking Codes and the order in which the list of names will appear. The candidate must have been assigned the Tracking Code(s) selected for the certificate to appear on the certificate. **Note:** A separate referral certificate will generate for each Tracking Code that is selected. The only exception to this is the "Certificate of Eligibles" used for DEU referrals.

> **Select Sort Order:** Candidates can be sorted either by last name or by rank.

> **Select Attachments:** Civilian Referral Briefs can only be selected when the Certificate Type Is Internal

> **Select Certificate Type:** Certificate Type is determined by the option selected under 'Select Certificate Type'.

> **Track Code/Description:** All the Tracking Codes assigned on the Candidate Referral Roster (CRR) will be listed here. Select the code(s) to use to generate a Referral Certificate(s). In the example, certificates will be generated on those individuals with Tracking Codes of "RFC" and "RFP".
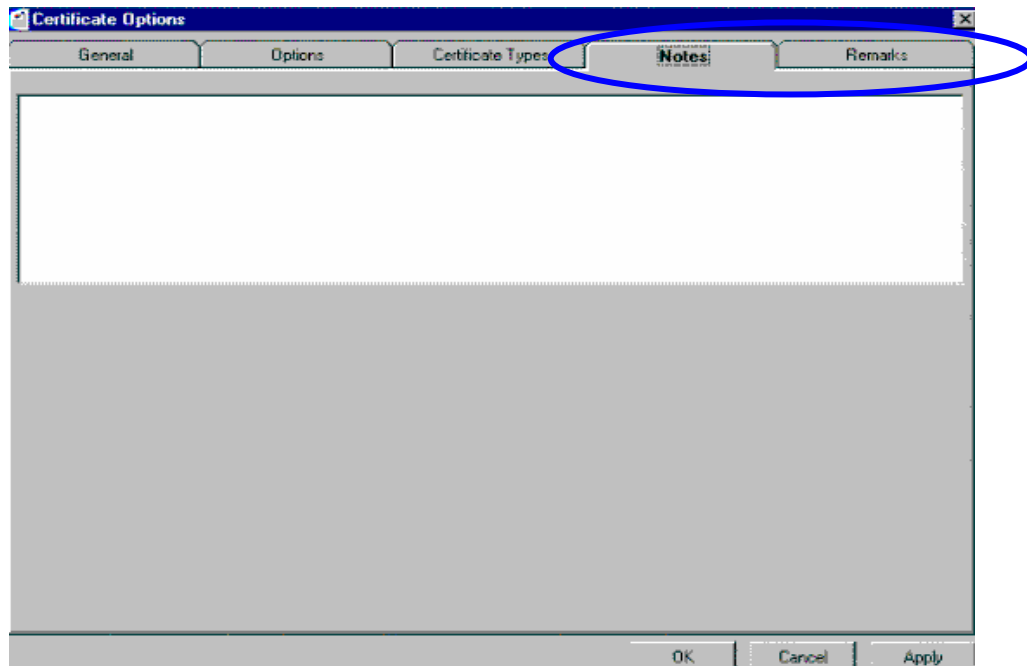
NOTES:
> **Civilian Referral Briefs:** Only available for internal candidates. This feature will not be used when an External certificate is selected.
> **Resume Text:** (All external candidates).
> **CONUS AEP:** (If required, use for positions filled within the Continental United States).
> **Hawaii AEP:** (Use for positions located in Hawaii).

The **Notes and Remarks** tabs are used to add additional information for the position or candidates on the referral certificate.

NOTE: Information typed in either of these areas will be displayed in either the Notes or Remarks area of the certificate. The maximum number of characters for each of these areas is 500 and a maximum number of lines is 5.

Generating a Referral Certificate/Package

When the certificate options area is complete, the Referral Certificate or Certificate Package may be generated. To produce only the certificate, select **Reports > Certificate**.

To produce the entire package (Certificate(s), AEP Reports, Resume Text or Career Briefs) select **Reports > Generate Package** from the main menu or use the **Generate Package** button.

Sample of Internal Referral Certificate Package:

Type of Certificate – created based on Tracking Code(s)

Air Force Candidate Referral Certificate		Type of Certificate: Promotion Consideration	
Requisition ID: 02JULI	Date Issued: 30-Sep-2002	Expiration Date: 30-Oct-2002	BU: AF1690
			# of vacancies: 1
Pay Plan - Series - Grade / Position Title: GS-0335-06 / COMPUTER ASSISTANT		Base: POPE AFB / CUMBERLAND / NORTH	Organization: LGL0
Entry Gr Lvl: 6			
Remarks:			
For Additional Information Call:		PATCOB: CLERICAL	Type of Position: Competitive Service
Name & Title of Certifying Official:		Signature of Certifying Official:	

Name	PayPlan - Grade	Org/Office Symbol	Phone	Action Code*
CF				
KL				
SC				

Column Headings - **NOTE**: these will vary depending on the Certificate produced

Civilian Referral Brief

CIVILIAN REFERRAL BRIEF		Current as of: 09-Jul-2003
FOR OFFICIAL USE ONLY. CONTAINS INFORMATION SUBJECT TO PRIVACY ACT OF 1974 AS AMENDED. PROTECT ACCORDINGLY.		
Name:		**SSN:**

DUTY PHONE:	DUTY LOCATION: Robins Af Base, Houston, GA	
PP-SERIES-GRADE: GS-0326-03	TITLE: OFFICE AUTOMATION CLERK	
OFF. SYMBOL: LY	CPCN: 9G209.OFFICE AUTOMATION CLERK	.APPR
ORGANIZATION: WARNER ROBINS ALC CE OL LY00 ROBINS AFB GA 31098-00		
DT. START POSN: 02-JAN-2002	SCD: 02-JAN-2002	DT. LAST PROMO: 02-JAN-2002
EXP TYPE: Federal Civil Service SUPV LEVEL: 8	ACQ CATEGORY: **<No Data>**	ACQ LEVEL: **<No Data>**
ASSGN EFFECTIVE DT: 02-JAN-2002	ASSGN STATUS: Active Assignment	Demo BB: Demo PP:
SKILL1: OAS Office Automation Clk/Ast		PERCENTAGE: 100.00 MONTHS: 16.00

EXPERIENCE HISTORY:

Start Dt.	End Dt.	PP-SERS-GR	Title			
	Exp Type		Supv Level	ACQ Category		ACQ Level
	Command				Demo BB	Demo PP
01-AUG-2001			Equipment Operating			Total Months Experience: 5.42
	Non-Federal Service		Non-Supervisory	**<No Data>**		**<No Data>**
	<No Data>				**<No Data>**	**<No Data>**
	Skill1: LAX		Engineering Equip Optg			Percentage: 100 Months: 5.42
01-AUG-1995			Plumbing			Total Months Experience: 12.03
	Non-Federal Service		Non-Supervisory	**<No Data>**		**<No Data>**
	<No Data>				**<No Data>**	**<No Data>**
	Skill1: 2GB		Plumbing			Percentage: 100 Months: 12.03
02-AUG-1991	02-DEC-2000	GS-0303-				Total Months Experience: 112.03
	Non-Federal Service		Non-Supervisory	**<No Data>**		**<No Data>**
	<No Data>				**<No Data>**	**<No Data>**
	Skill1: AKK / AMH		Clerk/Asst/Technician / Work Order Control & Auth			Percentage: 75 Months: 84.02
	Skill2: AKK / OFS / FIL		Clerk/Asst/Technician / Office Services / Fiscal Liaison			Percentage: 25 Months: 28.01

AEP Report

AFFIRMATIVE EMPLOYMENT INFORMATION

CERTIFICATE NUMBER: 02OC (Pull 1)

TYPE OF CERTIFICATE: Promotion Consideration

TITLE: MECHANICAL ENGINEER

PAY PLAN - SERIES - GRADE: GS-0830-12

The enclosed referral certificate(s) has the following representation:

___

1 HISPANIC MALES

___

You may have local goals for the categories below

DEFINITIONS:

DISABLED (NON-TARGET): Persons with medical disability codes greater than 05 as depicted in SF 256 with exception of target codes listed below

DISABLED (TARGET GROUP): persons with medical disability codes 16, 17 (DEAF); 23, 25 (BLIND); 28 and 32-38 (MISSING EXTREMITIES); 64-68 (PARTIAL PARALYSIS); 71-78 (COMPLETE PARALYSIS); 82 (CONVULSIVE DISORDERS); 90 (MENTAL RETARDATION); 91 (MENTAL ILLNESS); 92 (DISTORTION OF SPINE/LIMBS) as depicted on SF 256
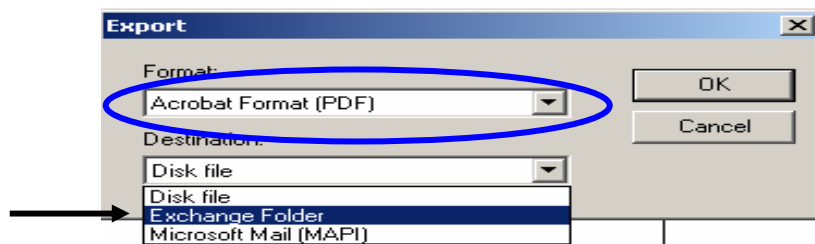
This data may not be available for certificates with non - Air Force Candidates.
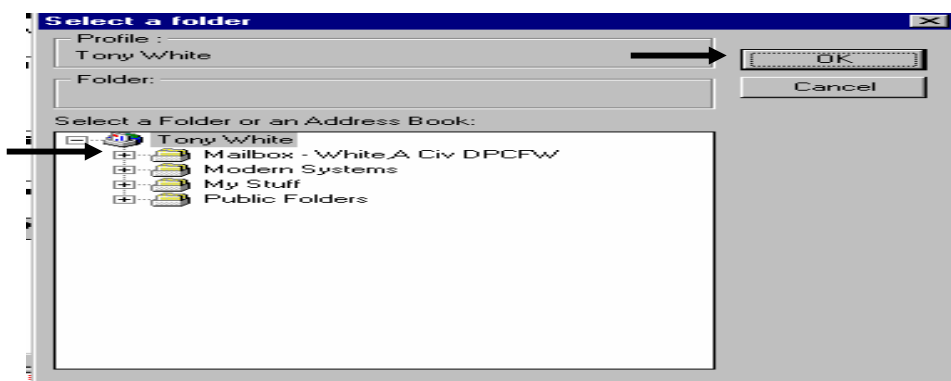
FOR OFFICIAL USE ONLY

## Sending the Package Electronically

- Select the Open Envelope, the following screen will appear.
- Select **Acrobat Format (PDF)** as the Format.
- Select **Exchange Folder** as the Destination. Click **<OK>**.

- The **Select a Folder** Window will display indicating your exchange profile name. Select your mailbox folder and click **<OK>**.


The certificate and all of the identified attachments will flow to your exchange inbox.
Select **Inbox** and click **<OK>**.
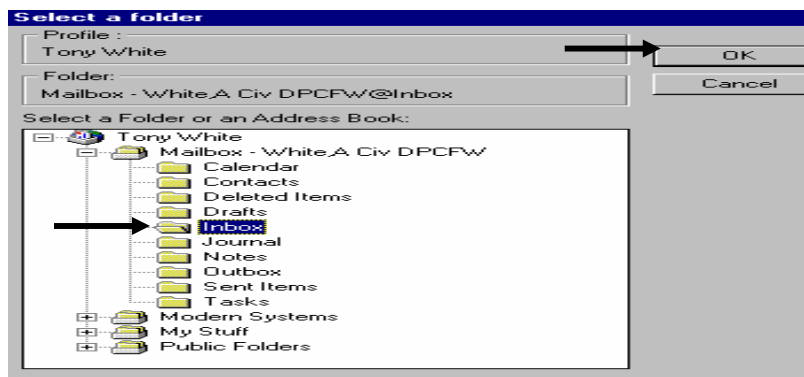
At this point the document may be open for final review or to add any other required documents/instructions, and forward to the CPF and/or selecting official based on internal procedures for that CPF.

- Or Select **Microsoft Mail (MAPI)** as the Destination. Click **<OK>**. This allows the user to send the email directly to the manager or intended person. Using the MAPI procedure the user can cut and past text information into the message area of the e-mail. E-mail **must be** open to use this method.
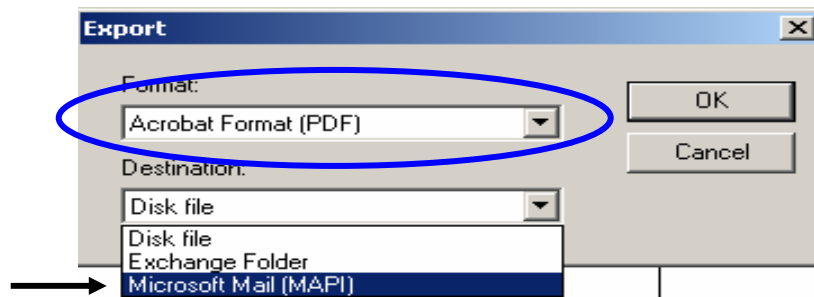
NOTE: The certificate or certificate package generated will be "Read Only."

Return of the Referral Certificate

Once the manager has made a selection(s), the certificate must be returned in hard copy form by fax, mail or hand-carried. When the completed certificate is received, the CRR should be updated to reflect the tracking codes the manager has assigned to the certificate: Selected, Declined, Referred Not Selected, etc.
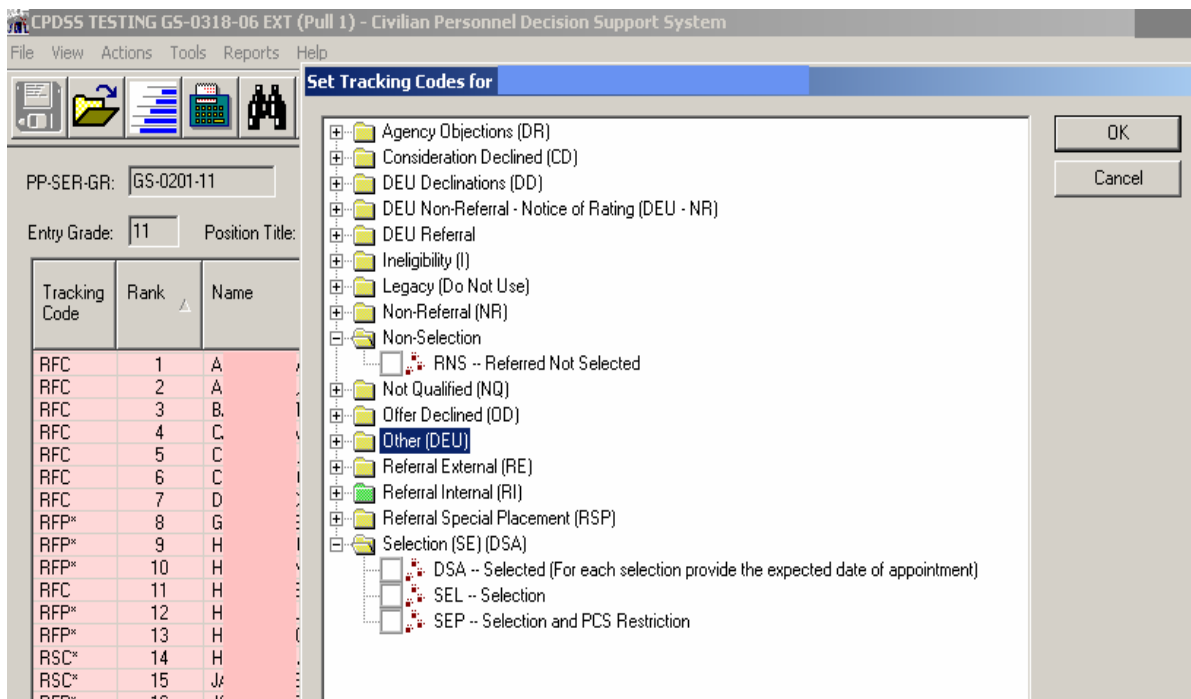
NOTE: Remember tracking codes only flow automatically to Resumix when one of the following occurs:

- Certificate Generation
- Certificate Package Generation
- Roster Archived

Any subsequent tracking codes applied to the CRR such as Selected and Non-Selected must be manually sent to Resumix. To send the Tracking codes to Resumix click the "Send Tracking" button Or **Actions > Send Tracking code** from the menu.
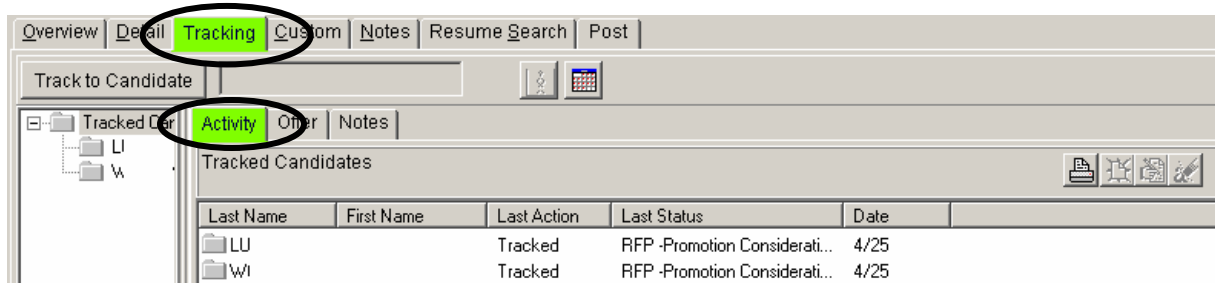
Hiring the Applicant – Updating Resumix

Once the effective date has been established, the staffing specialist has to update Resumix with the following information:

Step 1: Open the Resumix <u>requisition</u> being filled. (Follow the guidance is Chapter 3, Selecting an Existing Requisition.)
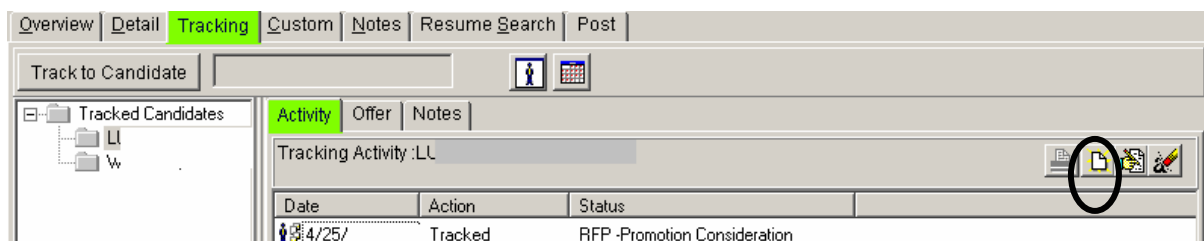
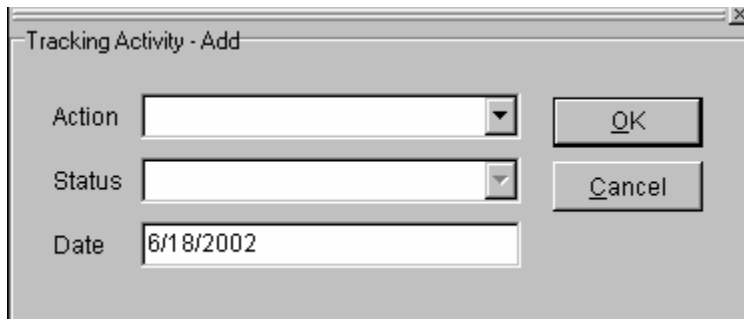**Step 2:** Click the **Tracking** tab.
Step 3: Select the **Activity** tab.

Step 4: Click on the **<u>selected</u>** applicant. The **Tracking Activity** for that applicant is now viewable.
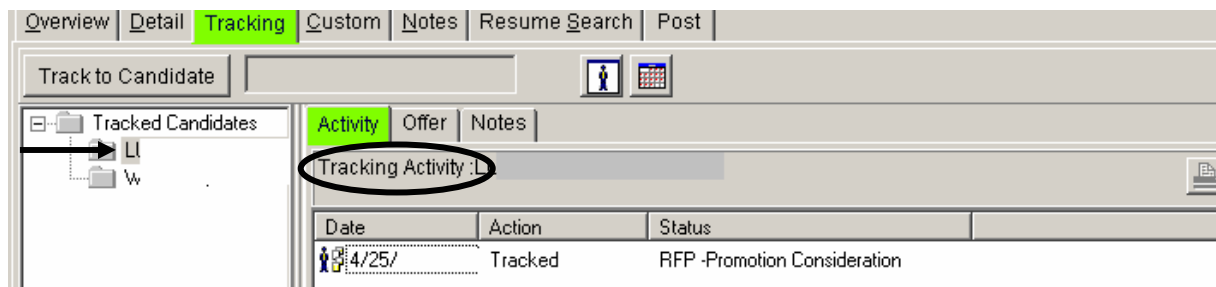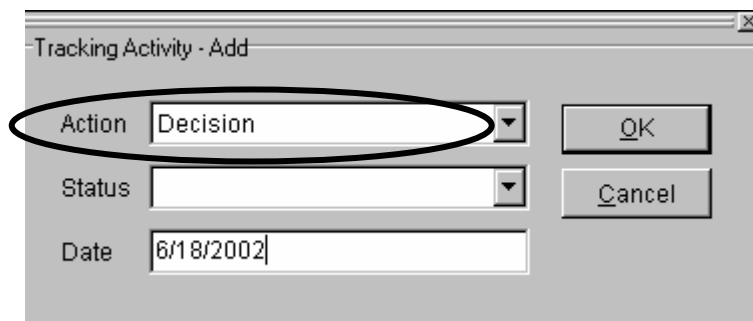

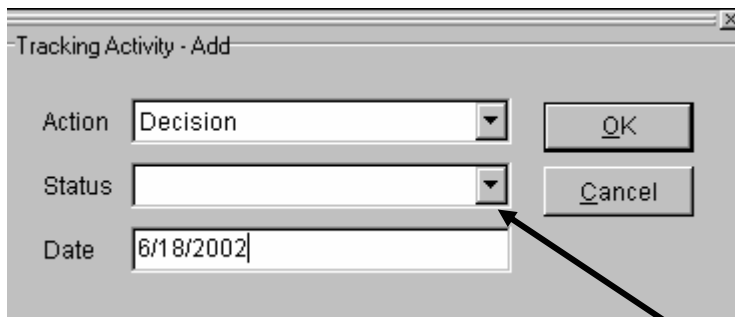**Step 5:** Click the "**New Action**" button.

Step 6: The **Tracking Activity – Add** box appears.

Step 7: Using the drop down menu select "**Decision**" as the Action.

Step 8: The **"Status"** field must be completed; however, it is dependent on several different factors.

When finished -
Click **OK**

Review the chart below for the appropriate **Status** code.

Candidate	Currently in DCPDS	Status =
Currently a Permanent Employee (Tenure = 1, 2)	Yes	Internal Accept
Currently a Temporary Employee (Tenure = 0)	Yes	External Accept
Currently serving on an Overseas Limited Appt or Term Appt (Tenure = 3)	Yes	Internal Accept
Not Currently an Employee	No	Accept
Currently an Employee	No	Accept

Decision/Accept

IMPORTANT!!! The staffing specialist will use the **Decision/Accept** Tracking Code **only** when hiring a candidate that is **not** currently in the DCPDS database. If filling a vacancy with an employee currently in the DCPDS **Decision/Internal Accept or Decision/External Accept should** be used.

When the **Decision/Accept** Tracking Code is selected in Resumix, **a new Applicant record is created in DCPDS to be used in the appointment process.** For this reason, the Tracking Code combination (**Decision/Accept**) is only to be used if the selected candidate **is not** currently an Air Force employee (not currently in the DCPDS database).

When the **Decision/Accept** Tracking Code is used, the system automatically
 ➢ Changes the applicant's status to **Hired,**
 ➢ Changes the position status to **Filled**, if only one (1) vacancy exist, and
 ➢ Decreases the Number of Openings by one.

Note: These automatic actions do not occur when you use the Internal Accept or the External Accept Tracking Code. You must change these fields manually.

Step 9: Notice the new entry on the **Tracking Activity** screen for the candidate selected. A similar entry is added when you use Internal Accept or External Accept.

Step 10: Update the Resume Summary for the selected candidate. Select the **Resume Summary** button.

Step 11: The **Resume Summary** window will appear. Select the **Custom** tab.

Step 12: Under the **General** group, locate **Resume Expiration** custom field. Change the **Resume Expiration** custom field to:

Position Candidate Selected For…	Action to be Taken …….
Temporary Position (Tenure = 0)	Change the date to current date.
Permanent/Term/Overseas Limited Position (Tenure = 1, 2, or 3)	Delete the resume expiration date.

NOTE: Only external applicants will have resume expiration dates.

Step 13: THIS STEP IS ONLY TO BE USED IF AN EXTERNAL CANDIDATE IS SELECTED FOR A PERMANENT/TERM/OVERSEAS LIMITED APPOINTMENT (TENURE = 1, 2, or 3). Prior to completing this step, you must make sure the DCPDS applicant record has flowed into DCPDS.

1) Under **Resume Summary** tab, select **History** tab.
2) Place a check ☑ in the **Available** block.
3) Change the source code to **INTERNAL**.

Under **Resume Summary** tab, select the **Notes** tab.

Insert the following note: Source code changed to internal - placement into permanent position on (enter date).

Click the **Save** button.

Step 14. To close a requisition. Open the Detail tab **in the requisition**; then select the Administrative tab.

    a.   Change the **Status** to the appropriate response by opening the drop down menu and selecting the appropriate status (e.g., Filled/Cancelled/Returned/etc.)

    b.   If there is more than 1 opening, manually change the number of openings; if there was only 1 opening, the system automatically will change the Filled field to 1 and the Remaining field to 0 .
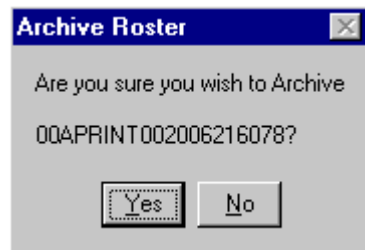

Click the **Save** button.
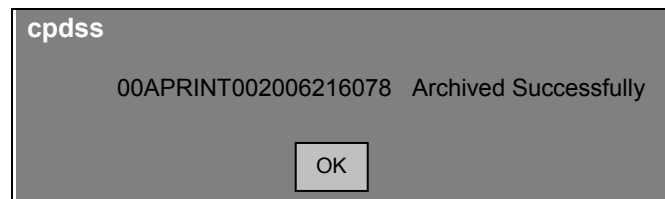
Archiving the CRR

With the CRR open, click the Archive CRR button or select **Actions > Archive** from the main menu to archive a CRR. The below message will appear to ensure that the user truly wishes to archive the roster.

Click **<Yes>** to continue.

> **Archive Roster**
>
> Are you sure you wish to Archive
>
> 00APRINT002006216078?
>
> [Yes]   [No]

If the archive is successful, the below dialog box will appear.

Click **<OK>**.

> **cpdss**
>
> 00APRINT002006216078   Archived Successfully
>
> [OK]

The File is Now Archived!!!!!!!

> **Note:**
>
> - Once a Case file is archived, the file cannot be manipulated in any way. Only notes may be added.
>
> - A case file can only be archived if the Job Analysis Promotion Plan Template is approved.
>
> - Specialists should archive the case files as soon as possible after EOD but at least within 90 days. Most of the case file documentation will be in CPDSS. To add any additional information to the CRR, copy the information to include in the case file, click **View > Roster Property** and paste the data into the Additional Information area.

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